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## CASE TRACKING

### Description:

*How to add, modify and end tracking, as well as print a tracking report, a tracking load report and a cases taken under advisement report.*

### Reference:

Online Coris Manual: <http://www.utcourts.gov/coris/corisman>

Court Services Online Training:

<http://www.utcourts.gov/intranet/dist/training/debtcoll.htm>

Clerks of Court Meeting: <http://www.utcourts.gov/intranet/dist/minutes/3-19-02d.htm>

### Overview:

*Tracking is invaluable in helping clerks monitor cases and insure parties complete specified scheduled requirements. By placing cases on tracking, clerks are able to run reports to help keep track of many case-related activities including appeals activities, civil stalking injunctions, exhibits, files that are checked out, mental health reviews, return dates, reviews, traffic school, cases under advisement and work projects.*

*Tracking is also useful to track bonds, court costs, partial payments and surety bond forfeitures. Additional tracking codes can be added by a supervisor. Fines, jail, community service, probation, diversions or pleas in abeyance may be automatically placed on tracking from the in-court screens.*

*Tracking is used to prepare the Under Advisement Report. The Under Advisement Rule is intended to reduce the time between case filing and disposition. All cases taken under advisement by the Court must be tracked by a clerk to prevent cases under advisement from becoming "lost" in the regular workload.*

*Rule 3-111.03 (2)(C)(iii)(a) states "not more than an average of three cases per calendar year under advisement more than two months after submission with no more than half of the maximum exceptional cases in any one calendar year; and (2)(C)(iii)(b) no case under advisement more than six months after submission."*

*Prior to closing a case, anything still on tracking should be researched and tracking terminated.*

## TRACKING

### Procedure/Computer Entry

#### To Place a Civil/Criminal Case on Tracking:

1. From the Primary Menu, enter the case number. **Case > Tracking** (F3)

Note: Tracking may also be accessed through the **Tool Box** in some in-court screens.

2. In the **Case Tracking** screen, select **Add**.
3. Choose a **Tracking Code** from the drop down box.
4. In the **Review Date** box, enter a date to review the case.
5. Select **Enter**.

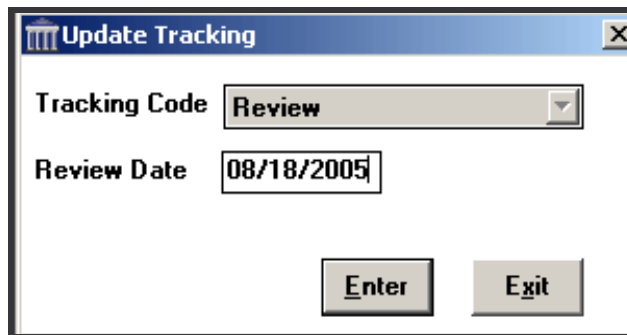
The screenshot shows the 'Case Tracking' application window. At the top, there's a title bar with a small icon and the text 'Case Tracking'. Below the title bar, there are two input fields: 'Case' with the value '050000076' and a dropdown menu showing 'Debt Collection'. To the right of these fields are two buttons: 'Clear Case' and 'Find Case'. Below these fields is a larger input field for 'Name' containing the text 'SALT LAKE CITY CREDIT UNION'. Below the 'Name' field is a table with the following columns: 'Reason', 'Review Date', 'Clerk', 'Tracking Started', 'Tracking Ended', and 'Ended User'. An 'Add Tracking' dialog box is overlaid on the table. This dialog box has a title bar with a small icon and the text 'Add Tracking'. It contains two input fields: 'Tracking Code' with a dropdown menu showing 'Review', and 'Review Date' with the value '08/22/2105'. At the bottom of the dialog box are two buttons: 'Enter' and 'Exit'. Below the table in the main window are four buttons: 'Add', 'Update', 'End', and 'Exit'.

6. Select **Exit**.

## TRACKING

### To Modify Tracking:

1. From the Primary Menu, enter the case number. **Case > Tracking** (F3)
2. In the **Case Tracking** screen, highlight the **Reason** and click on **Update**.
3. Change the **Review Date**.
4. Select **Enter**.



The screenshot shows a window titled "Update Tracking". Inside the window, there are two labels: "Tracking Code" and "Review Date". The "Tracking Code" label is next to a dropdown menu that currently displays "Review". The "Review Date" label is next to a text box that contains the date "08/18/2005". At the bottom of the window, there are two buttons: "Enter" and "Exit".

5. Select **Exit**.

Or, at the **Case Tracking** screen, select **Add**.

1. At the **Add Tracking** screen, choose a tracking code from the drop down box. Enter a **Review Date**.
2. Select **Enter**.
3. Highlight the **Reason** in the list you want to change.
4. Select **End**.
5. Select **Exit**.

## TRACKING

### To End Tracking:

1. From the Primary Menu, enter the case number. Note: Tracking may also be accessed through the **Tool Box** in some in-court screens.
2. Select **Case**.
3. Select **Tracking** (F3).
4. Highlight the **Reason**.
5. Click **End**.

The screenshot shows a window titled "Case Tracking" with a blue header bar. Below the header, there are input fields for "Case" (containing "050000075") and "Debt Collection". Below these is a "Name" field containing "SMYTHE, NEWMAN". To the right of the name field are two buttons: "Clear Case" and "Find Case". Below the input fields is a table with the following data:

Reason	Review Date	Clerk	Tracking Started	Tracking Ended	Ended User
Review	08/22/2005	maryb	08/05/2005	08/05/2005	maryb

At the bottom of the window, there are four buttons: "Add", "Update", "End", and "Exit". The "Exit" button is highlighted with a dashed border.

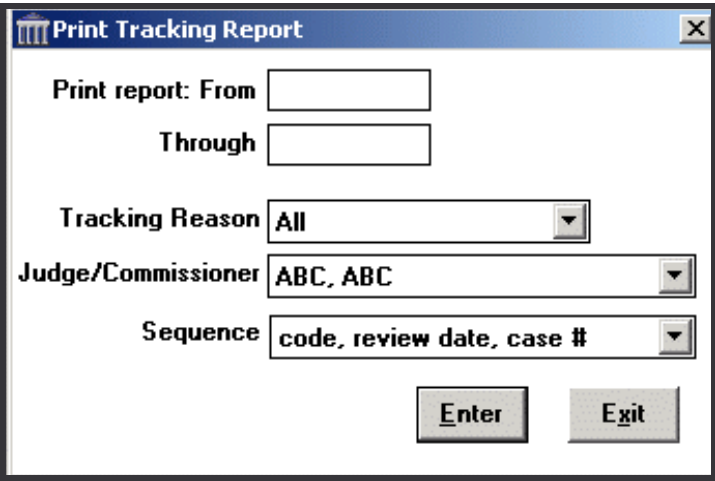
6. Select **Exit**.

## TRACKING

### To Print a Tracking Report:

A tracking report will give the tracking review date, case number, case name, set date, clerk and judge for type of case(s) selected for a given period of time.

1. **Information > Reports > Tracking > Tracking Report.**
2. In the **Print Tracking Report** screen, enter **From** date and **Through** date.
3. Select the **Tracking Reason** from the drop down box.
4. Select the **Judge/Commissioner** from the drop down box.
5. Select the **Sequence** from the drop down box.  
(This is the order your report will printout in.)
6. Select **Enter**. A message appears, “**Report preparation has been started.**” Click **ok**.



**Print Tracking Report**

Print report: From

Through

Tracking Reason

Judge/Commissioner

Sequence

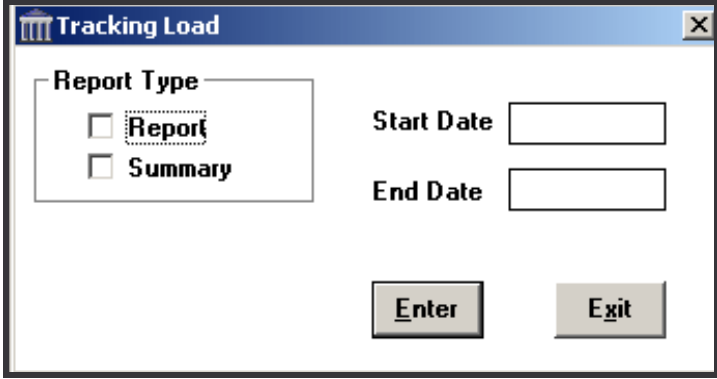
7. Select **Exit**.
8. Print the report from the **Print Index**.

## TRACKING

### To Print a Tracking Load Report:

A tracking load report will give the day, tracking review date and count/code for a given period of time. This report is useful to see how many types of tracking codes are being used on a given day.

1. **Information > Reports > Tracking > Tracking Load.**
2. In the **Tracking Load** screen, select **Report Type**.
  - A. Report will give you a count of each code for each day.
  - B. Summary will give you a summary of each code for the dates entered.
3. Enter a **Start Date** and an **End Date**.
4. Select **Enter**. A message appears, “**The tracking load report has been started.**” Click **ok**.



The screenshot shows a software window titled "Tracking Load". Inside the window, there is a section labeled "Report Type" containing two radio button options: "Report" (which is selected) and "Summary". To the right of these options are two empty text boxes labeled "Start Date" and "End Date". At the bottom of the window, there are two buttons: "Enter" and "Exit".

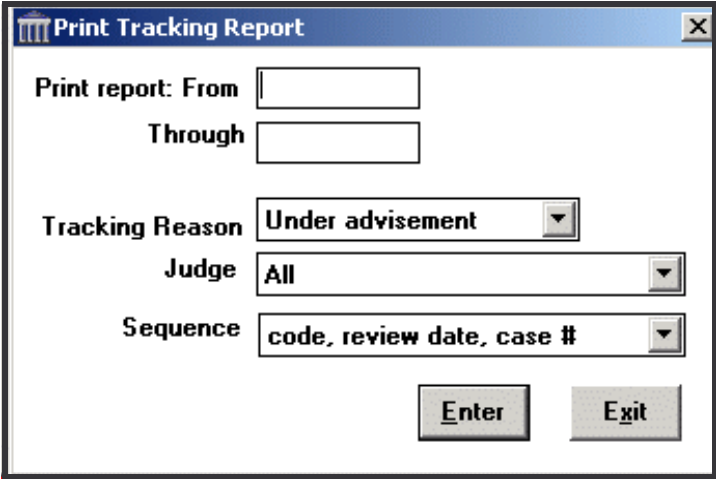
5. Select **Exit**.
6. Print the report from the **Print Index** screen.

## TRACKING

### To Print a Tracking Report for Cases Taken Under Advisement:

A tracking report for cases taken under advisement will give the code, review date, case number, defendant's name, set date, clerk, judge and days under advisement for a given period of time.

1. From the Primary Menu, select **Information**.
2. Select **Reports**.
3. Select **Tracking**.
4. Select **Taken Under Advisement**.
5. In the **Print Tracking Report** screen, enter **Print Report: From** date.
6. Enter **Through** date.
7. Select **Judge** from the drop down box.
8. Select **Sequence** from the drop down box.
9. Select **Enter**. A message appears, "**Report preparation has been started.**" Click **ok**.



**Print Tracking Report**

Print report: From

Through

Tracking Reason

Judge

Sequence

10. Select **Exit**.
11. Print the report from the **Print Index** screen.